

2025 Global Organic Equivalency Updates



**Natural Products Expo West
Presented by Chris Anderson
Sustainable Strategies
Advisors in Food & AgriCulture**



Foreign
Agricultural
Service

Public
Private
Partnership



**ORGANIC
TRADE
ASSOCIATION**



Organic Equivalency Arrangements 101

- Comparable & Verifiable Systems
- Not Identical Systems
- Ensure Organic Integrity



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Why Organic Equivalency Arrangements Matter

- Expanding Organic Trade
- Reduce Trade Barriers
- Decrease Costs & Requirements of Multiple Certifications



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Regulatory evaluation

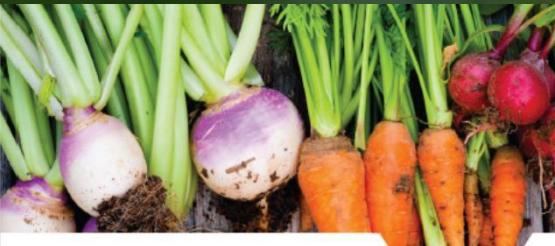
Meetings & discussions

**On-site control systems
assessment**

**Continually monitored to
ensure compliance**

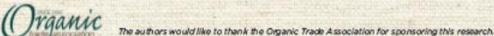


Positive Impacts of Organic Equivalency Agreements



Impacts from Organic
Equivalency Policies:
A Gravity Trade Model Analysis

Edward C. Jaenicke, Penn State University
Iryna Demko, Penn State University
December 2015



The authors would like to thank the Organic Trade Association for sponsoring this research.



58%

Exports

110%

Imports



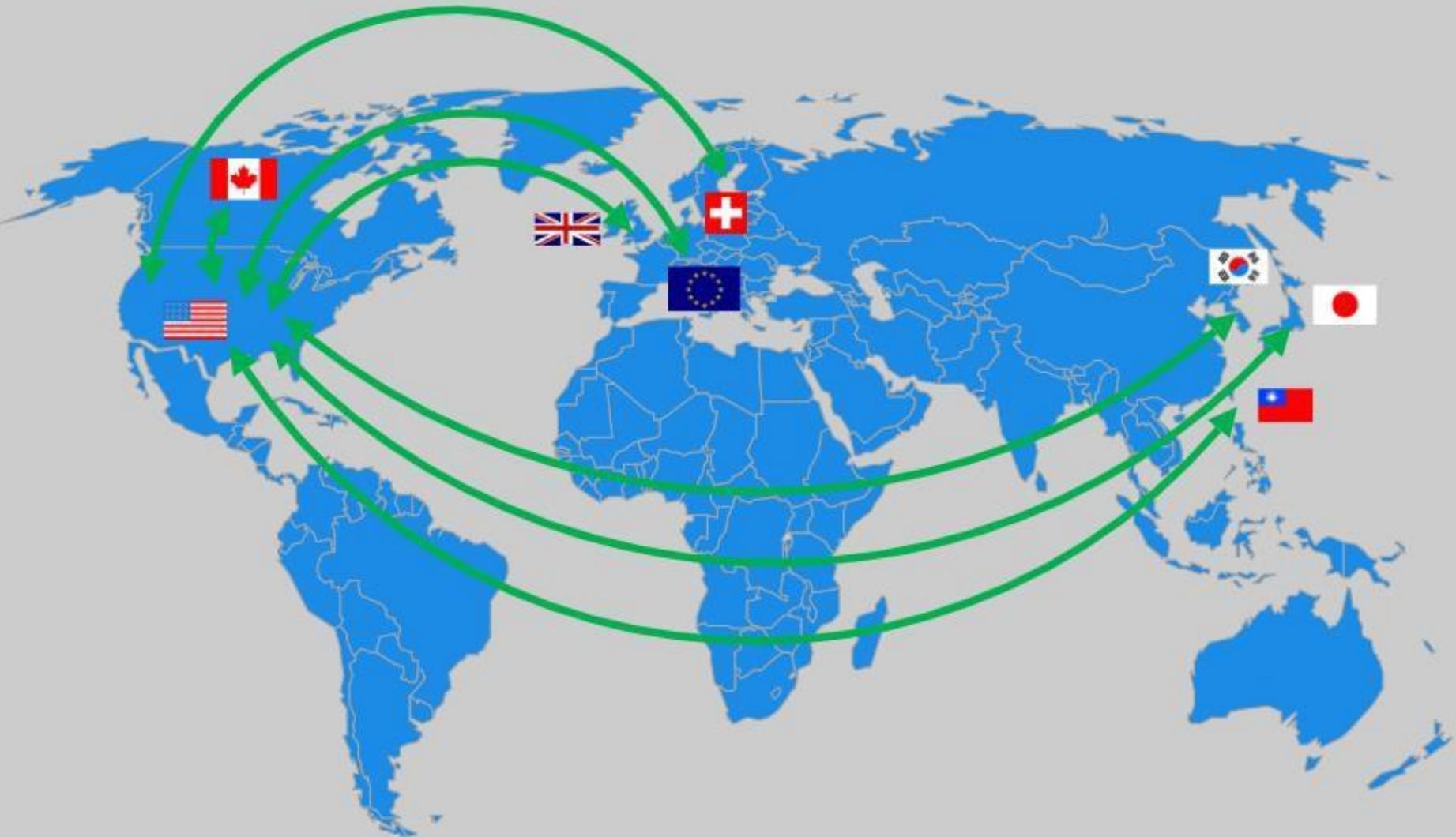
Positive Impacts of Organic Equivalency Agreements

- ✓ Consumers benefit
- ✓ Farmers benefit
- ✓ Soils benefit
- ✓ Livestock benefit
- ✓ Environmental benefit



US Equivalency Partners





US Organic Equivalency

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U.S. Organic Top Export Markets

1. Canada *
2. Mexico
3. Korea *
4. Taiwan *
5. Japan *
6. Vietnam
7. Dominican Republic
8. Saudi Arabia
9. India
- United Kingdom *



Top U.S. Organic Import Partners

1. Mexico
2. Canada *
3. Peru
4. Italy *
5. Ecuador
6. Brazil
7. Argentina
8. Columbia
9. Turkey
- Honduras



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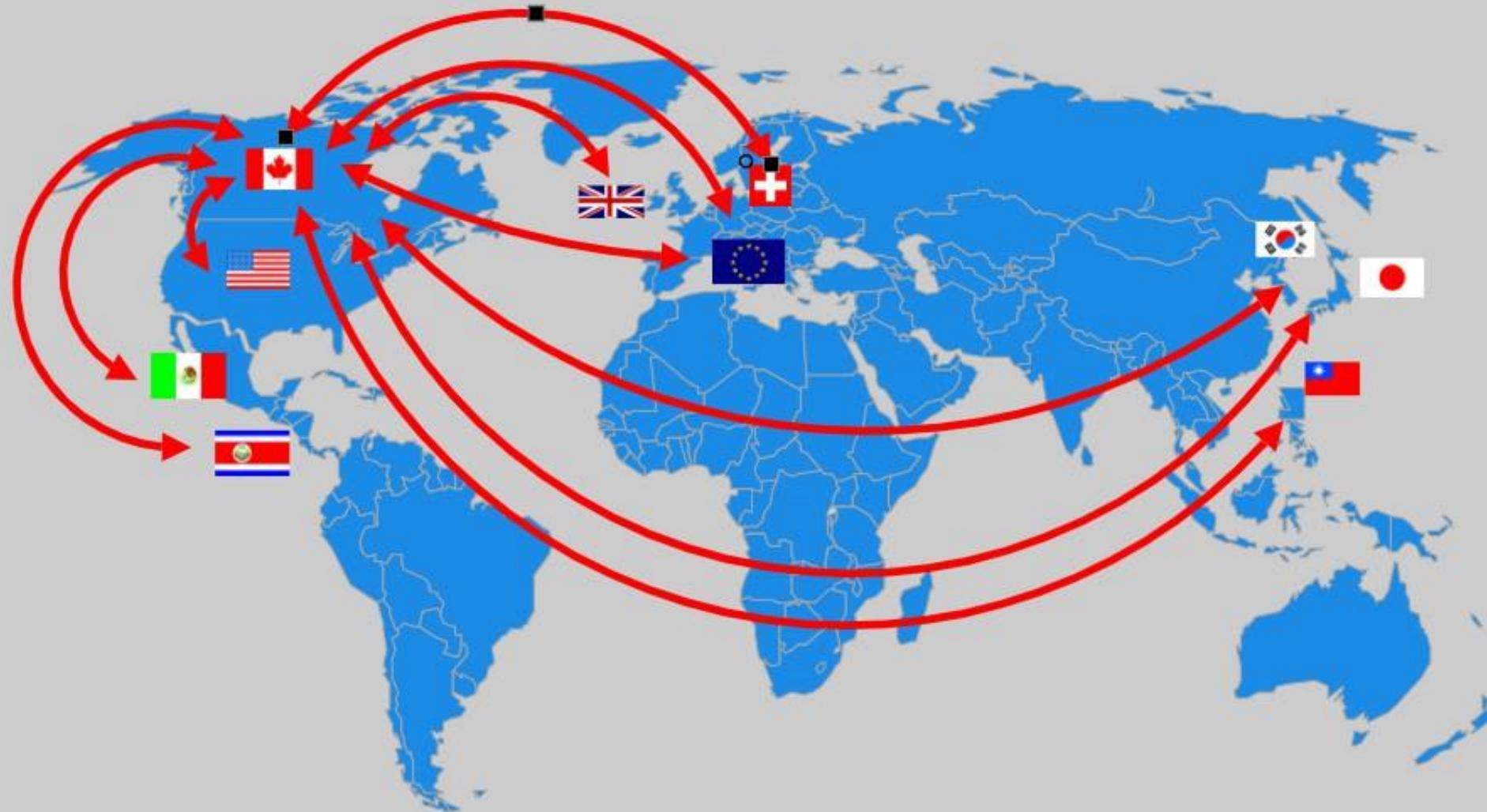


Canada



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Canadian Organic Equivalency



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Current Arrangement



Access to Canadian Market

- Sodium Nitrate – Prohibited
- Hydroponics - Prohibited
- Canadian Livestock
- Stocking Rates Must be Followed

Partially Resolvable

Potentially Resolvable

Critical Variances

Access to U.S. Market

- Livestock and Livestock Products Produced Using Antibiotics - Prohibited

Potential New Critical Variances

- Wine



Canada US
Organic

Natural Products
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Major Revisions Add Complexity



United States

- Strengthening Organic Enforcement

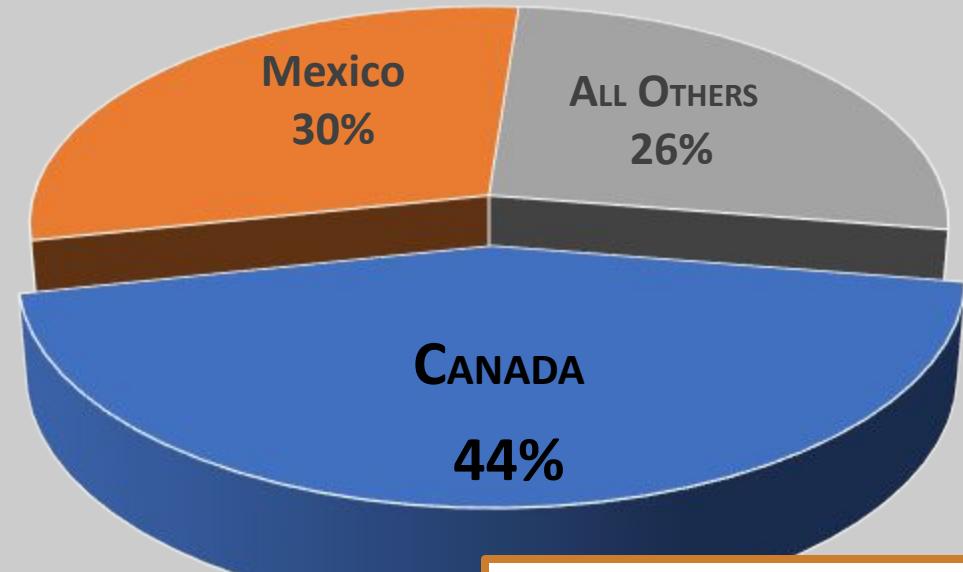
Canada

- 2020 Organic Program Updates
- 2025 Organic Program Updates

Canada/Mexico Equivalency Arrangement

US Organic

Export Markets



Canada US
Marketplace

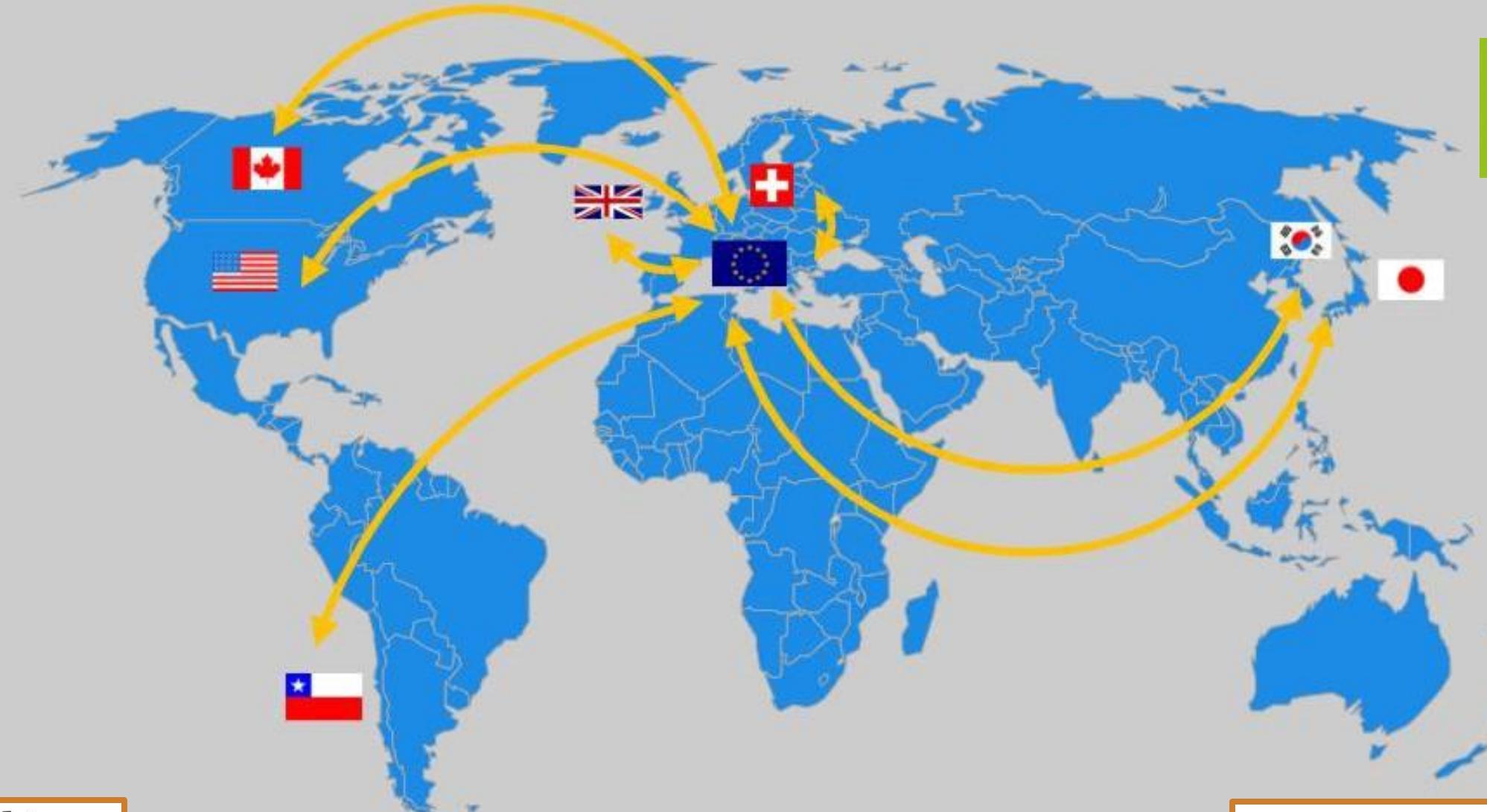
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European Union



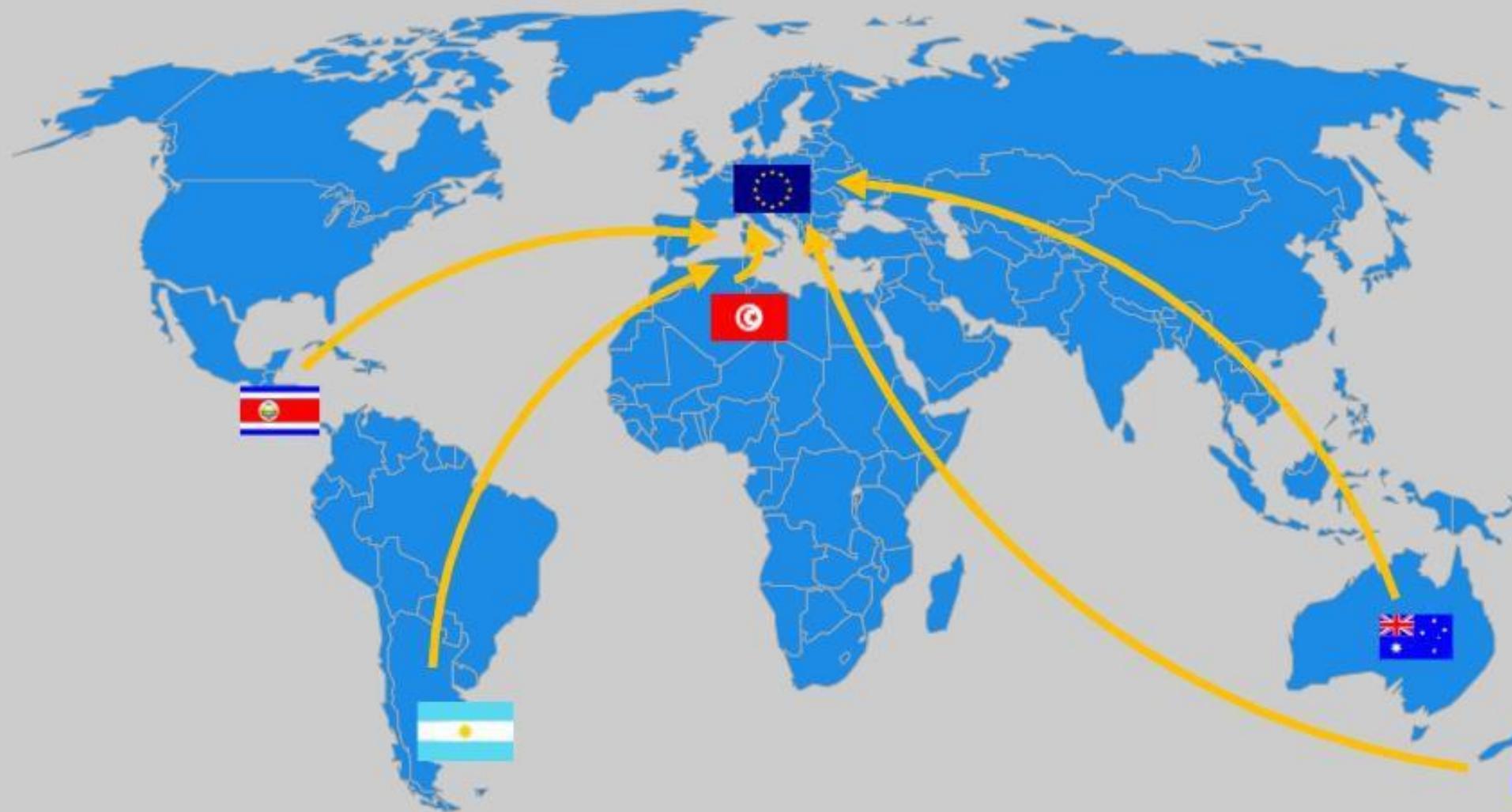
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EU Organic Equivalency



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EU Organic Supply



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Current Arrangement

Access to EU Market

- Wine
 - Prohibited practices and allowed substances
 - Antibiotics prohibited in apple and pear products

RESOLVED

Potential New Critical Variances

- Hydroponics

odium Nit



Critical Variances

Access to U.S. Market

- Livestock (and livestock products) must be produced without antibiotics
- Wine may not contain prohibited substances (sulfites)
- Aquatic animals may not be exported to U.S.



EU US
Organic Equivalency



United States

- Strengthening Organic Enforcement

European Union

- 2018/848
- Delegating Acts
- Implementing Acts

Major Revisions Major Complexity

2023 GLOBAL ORGANIC
RETAIL FOOD SALES



EU Organic
Marketplace



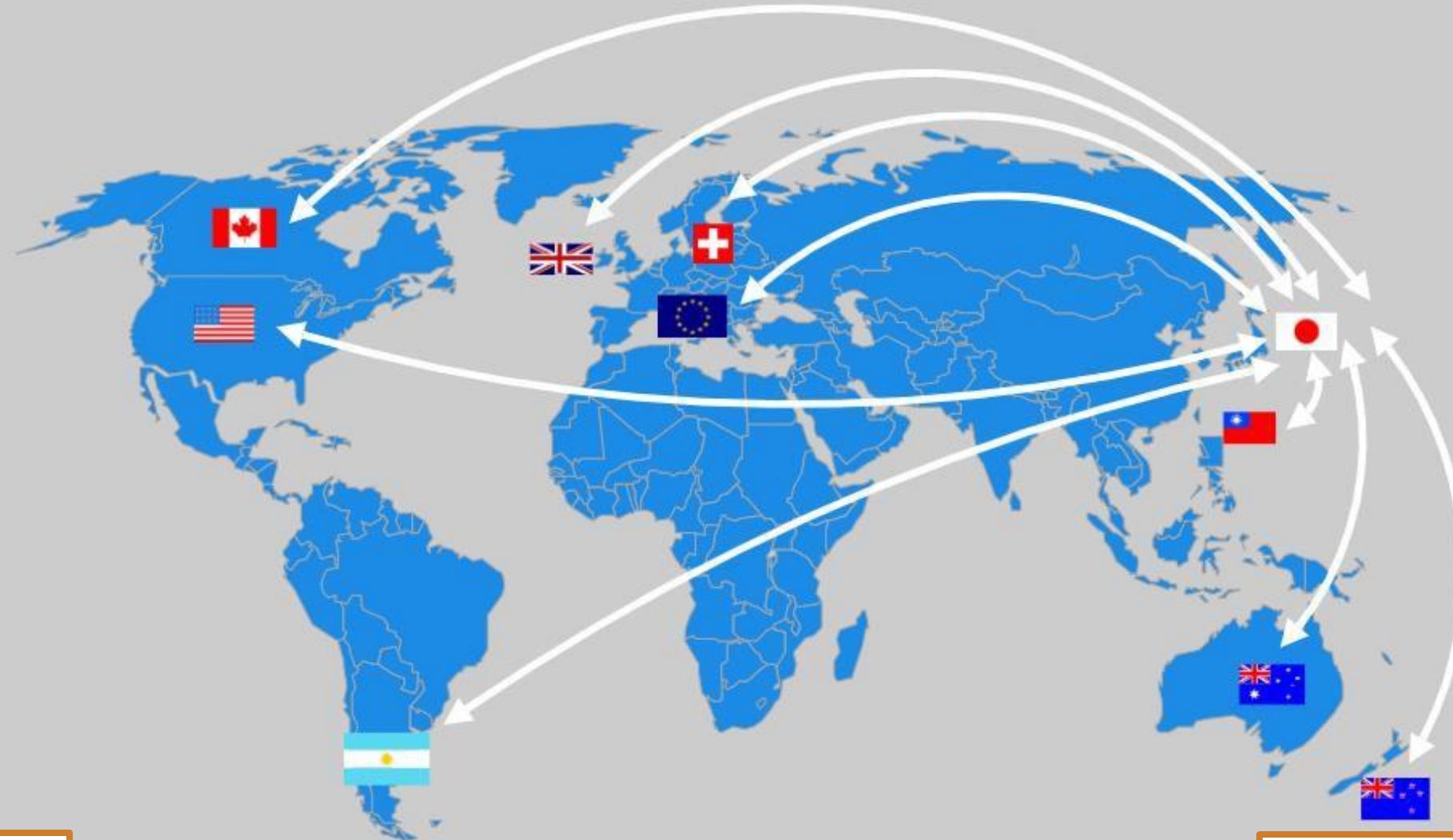
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Japan



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Japan Organic
Equivalency



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2. Livestock & Livestock Products
3. Alcohol

TM 11 Import Certificate Required



Japan's Organic Program

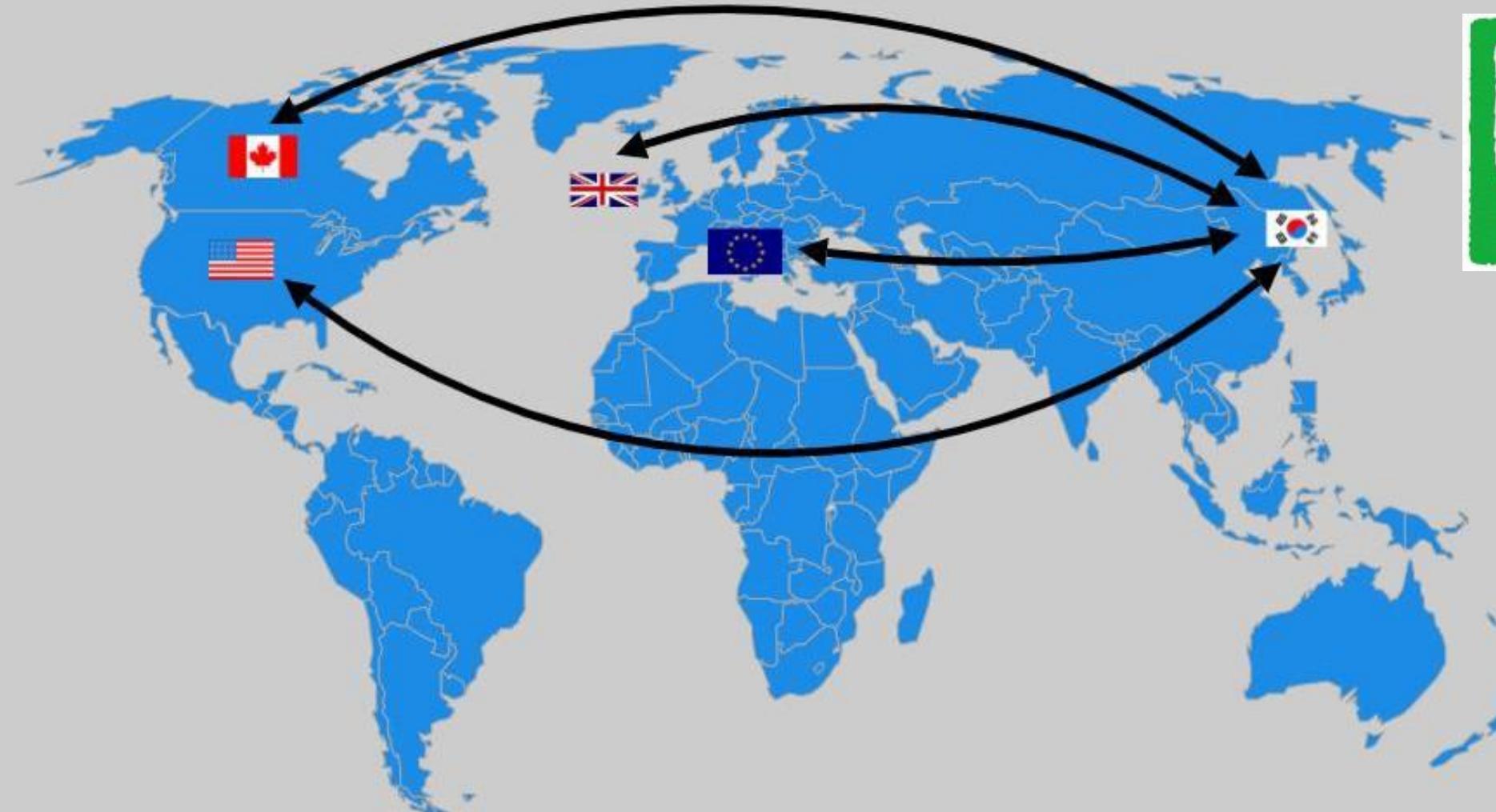


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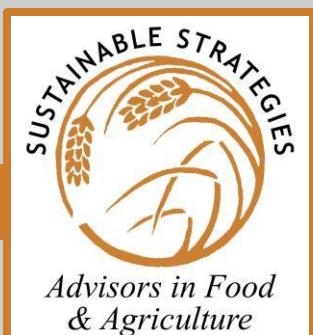


Republic of Korea

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Korean Organic Equivalency



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Equivalence Applies Only to
Organic Processed Food
Products

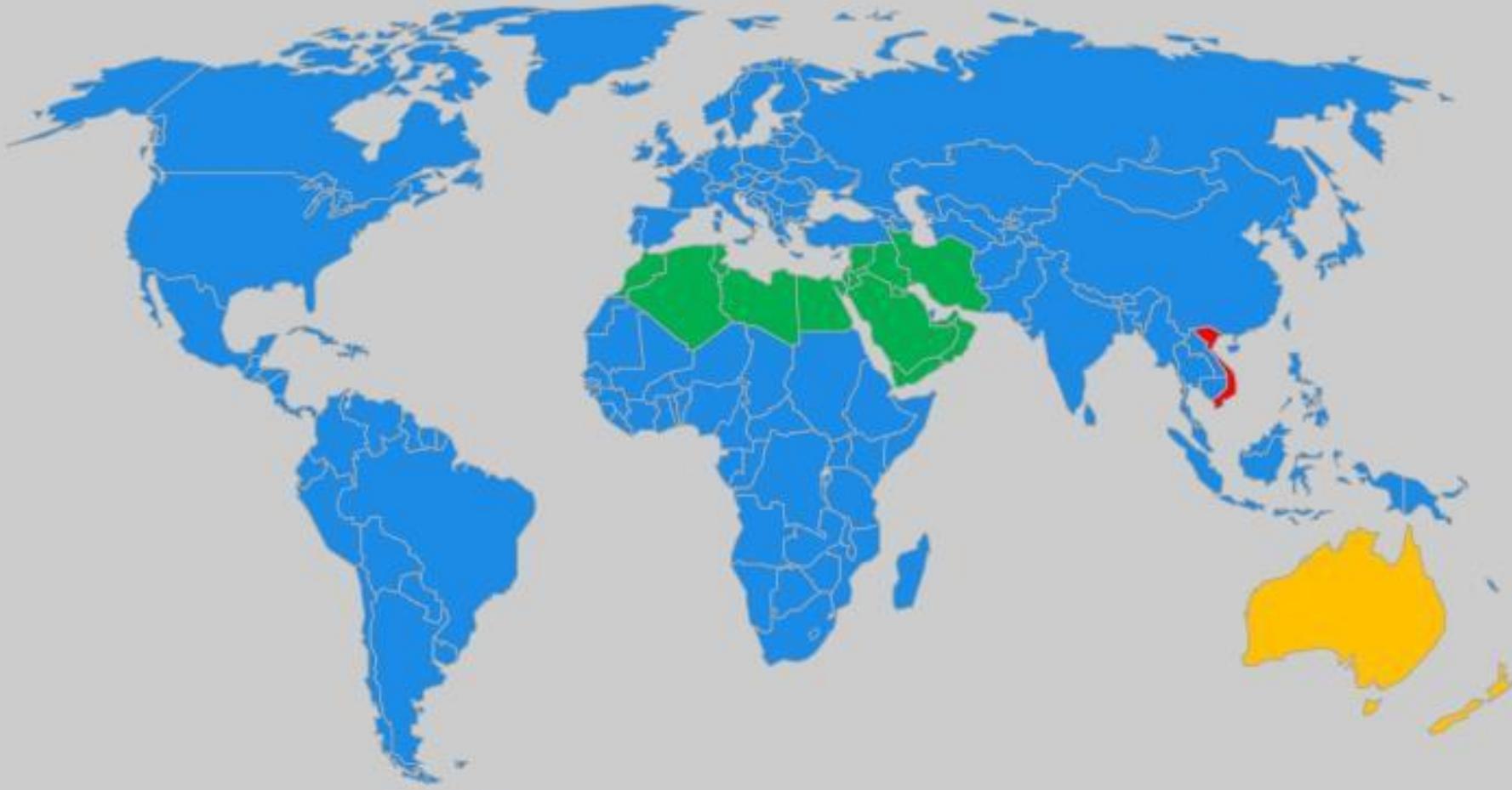
As Defined by the
Korean Food Code



Korean
Organic



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Growing Organic



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Crops

- Hydroponic Production
- Chilean Nitrate
- Sodium Nitrate

Processed Products

- Wine Ecological Standards
- Wine Materials
 - Sulfite - Types and Concentrations
 - Clarifying & Filtering Agents

Livestock

- Antibiotic Use in Livestock (Meat)
- Antibiotic Use in Livestock Products (Dairy, Cheese, Eggs)
- Animal Welfare Standards
- Livestock Stocking Rates
- Aquaculture

Common
Critical





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